COVID-19 Community Team Outreach Tool

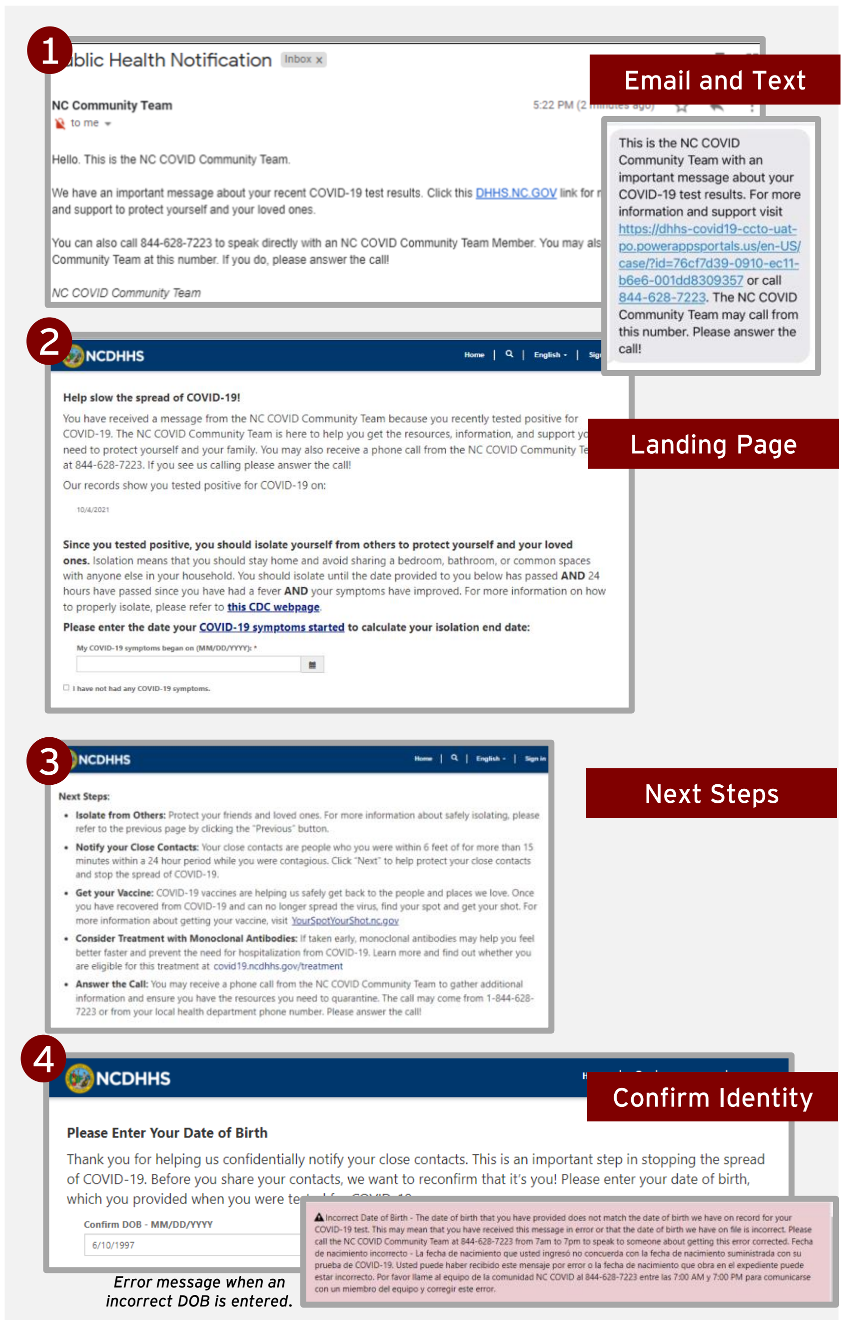
Understanding the Case Patient Portal

The new case patient portal will allow cases to enter contacts on their phone or computer directly from the digital notification they receive. Read on to understand how this may impact your work.

WHAT CASE PATIENTS SEE: Case Notification and Portal

All cases who test positive for COVID-19 and flow into CCTO from NC COVID will be sent an automatic text and/or email notification attempting to inform them of their positive result via a link to a landing page. **This link is unique to the case patient and allows them to provide a symptom onset date, to calculate personal isolation dates, and to enter contacts. See below for the case patient's perspective.**

1. Case patient receives a text or email directing them to click a link with information about their COVID-19 test result. This link is now unique to this case.
2. Case patient clicks the link and arrives at a unique landing page that lists the date of their positive test and requires them to **enter their symptom onset date** or to select that they have not had any symptoms. **The page automatically uses this information to generate a unique isolation end date** for 10 days after the symptom onset date (or 10 days after the test date if no symptoms).
3. Case patients who click "Next" will be given next steps – to isolate from others, to notify their close contacts, to consider treatment, and to get the COVID-19 vaccine.
4. Case patients who click "Next" will be asked to confirm their identity by entering their date of birth, which was collected at the time of their test. *If the case enters a DOB that does not match the one in the system, they will receive an error message at the top of the page and will not be permitted to proceed.*



Refer to the Digital Outreach Samples doc for larger screenshots.

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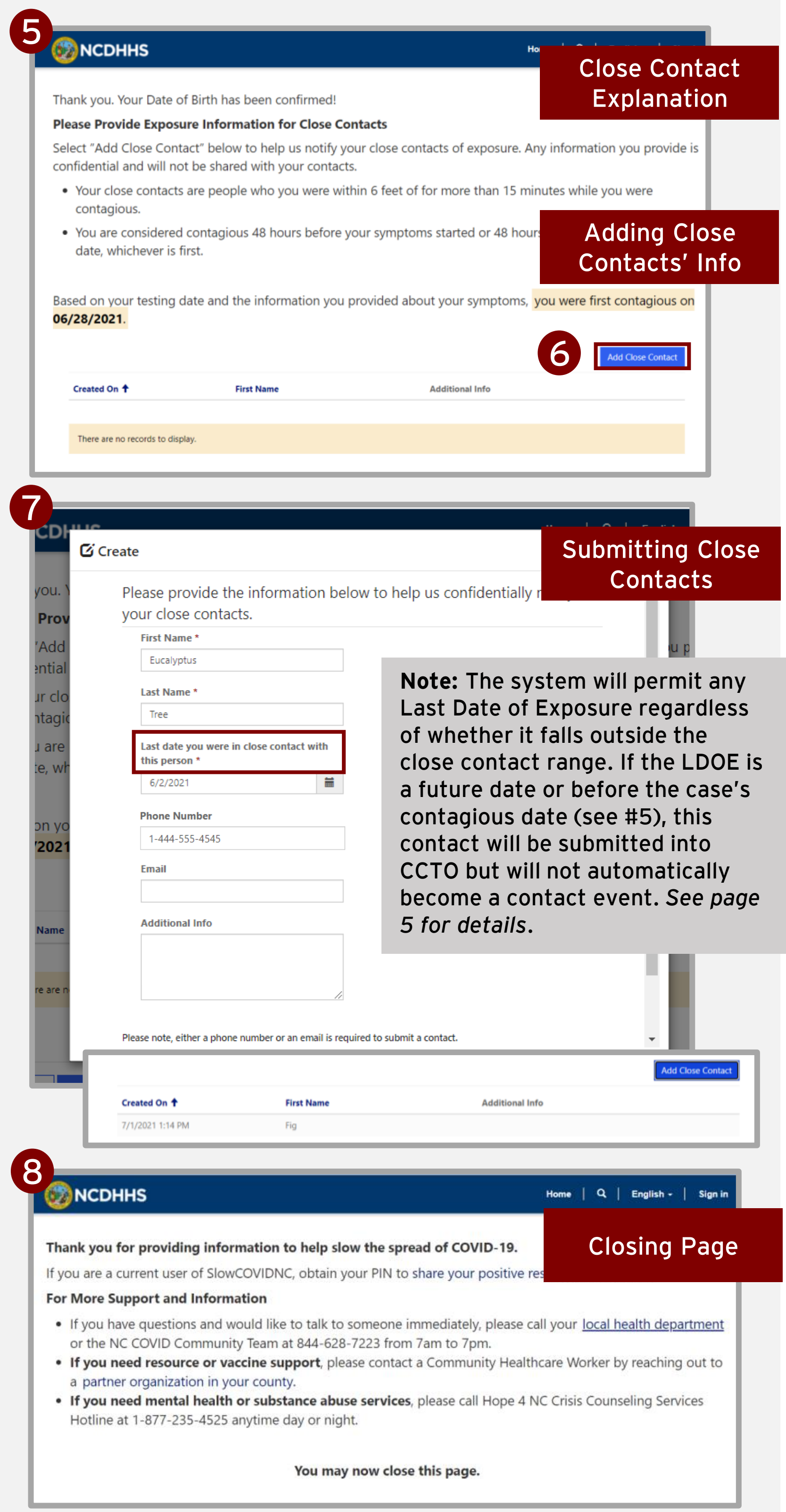
WHAT CASES SEE: Case Notification and Portal (cont'd.)

5. Case patients who click "Next" will be taken to a page that provides them with a definition of a "close contact" and a calculated date for the start of their contagious period, which is calculated as 48 hours prior to their test date or symptom onset date (whichever is earlier). It also prompts them to submit information about their close contacts so that contacts can be notified of their exposure.
6. Clicking "Add Close Contact" provides the case with a form to complete the contact's first and last name, the last date of exposure, a phone number, email, and any additional information the case patient would like to provide via a free text box. **First name, last name, last date of exposure, and email OR phone are required.**
7. Clicking "Submit" will lock this contact and will automatically submit them into CCTO, and this process to submit a contact can be repeated as many times as needed. *See page 5 for details on locating this information when it arrives in CCTO.*
8. Clicking "Next" a final time after adding contacts provides a closing page with information about SlowCOVIDNC, resources for support, and information for contacting the local health department if needed. At this point, the case may close the page. *The case patient portal may be re-accessed at any point using the received link.*



Note: The system will permit any Last Date of Exposure regardless of whether it falls outside the close contact range. If the LDOE is a future date or before the case's contagious date (see #5), this contact will be submitted into CCTO but will not automatically become a contact event. *See page 5 for details.*

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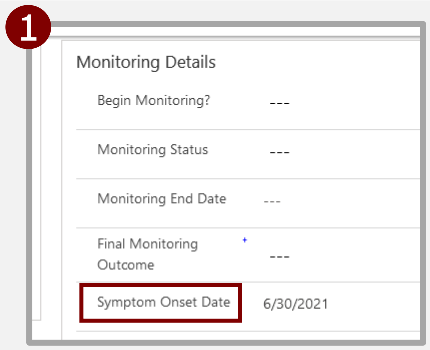
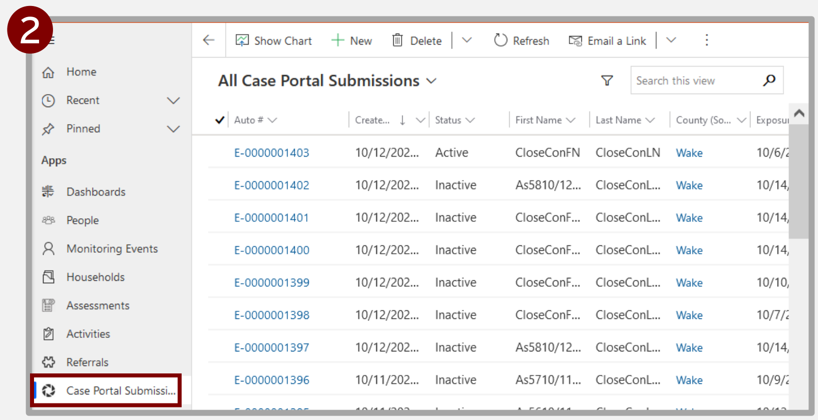
FOR ALL CCTO USERS: Locating Info From the Case Patient Portal Within CCTO

Information provided by cases through the case patient portal will update directly within CCTO (NOT NC COVID), and you can use this data to inform your contact tracing or case investigation work:

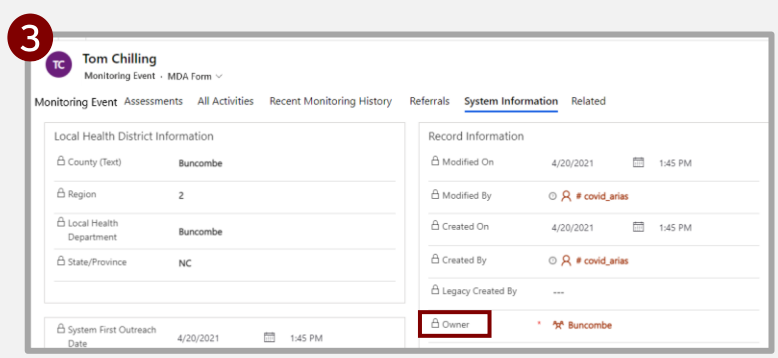
NOTE: As a result of the information required for case patients to utilize the case patient portal properly, **Date of Birth** and **NC COVID Diagnosis Date** (which will lock immediately upon completion) are required fields for all cases within CCTO. *If you add an incorrect NC COVID Diagnosis Date, turn the notification toggle off and request support via your admin or ServiceNow.*

1. When a patient enters information within the portal, their CCTO case monitoring event (ME), which has already flowed in automatically from NC COVID, will reflect a symptom onset date if one was provided. This is displayed in the editable **Symptom Onset Date** field.
2. Contact submissions made by case patients flow directly from the case patient portal into CCTO under the **Case Portal Submissions Tab.** All the contacts submitted here will **automatically** also have a contact monitoring event created within the **Monitoring Events Tab** as long as their last date of exposure is the current date or a past date that is after the case's contagious date; therefore, generally, no action is required on the Case Portal Submissions Tab.*
3. Within the Monitoring Events Tab, each contact event that is created from a case's submissions will be assigned to the **county owner team of the case patient who entered them into the portal.**





***Note on contact submissions that are not automatically accepted:** *If a case provides an LDOE for a submitted contact that is a future date or that is before the case's contagious date, a contact event will **not** be created automatically; however, the contact information will still be submitted in the portal and can be viewed in the Case Portal Submission Tab in CCTO. A CI should verify with the case whether this person is a true contact. See page 5 for details on how to identify these submissions and generate a contact event from them if needed.*



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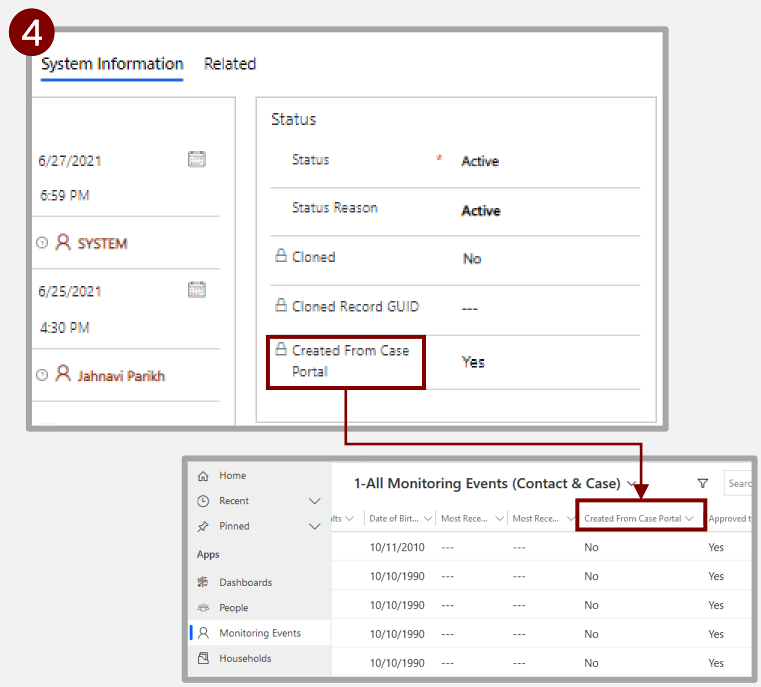
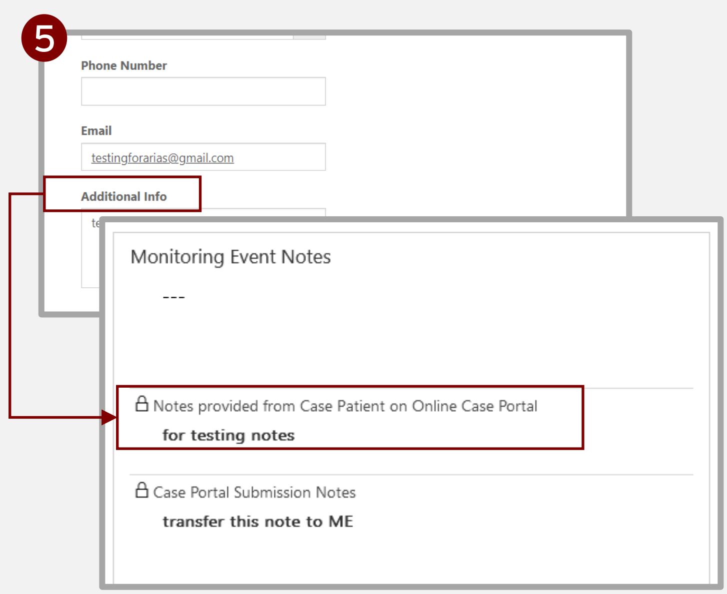
FOR ALL CCTO USERS: Locating Info From the Case Patient Portal Within CCTO

4. The **Created from Case Portal** field in the System Information page will be toggled to "Yes" for any contact monitoring events that have flowed into CCTO from the case patient portal. *To display all contact events that originated from the case patient portal within the Monitoring Events Tab, you can filter the **Created from Case Portal** column at the far right of the **All Monitoring Events** view.*

5. If the case patient has completed the "Additional Info" box during contact submission though the portal, a box called **Notes Provided from Case Patient on Online Portal** will appear on the created contact monitoring event. *Additionally, an ME box for **Case Portal Submission Notes** will display any extra information that was manually entered on the case portal submission record by a CI or CT.*





FOR ADVANCED USERS AND CASE INVESTIGATORS:

For more information about reviewing case submissions, **please see the next page.** **You should only complete the manual approval process for these submissions if specifically instructed to do so.**

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FOR CASE INVESTIGATORS: Locating Case Patient Portal Contact Submissions

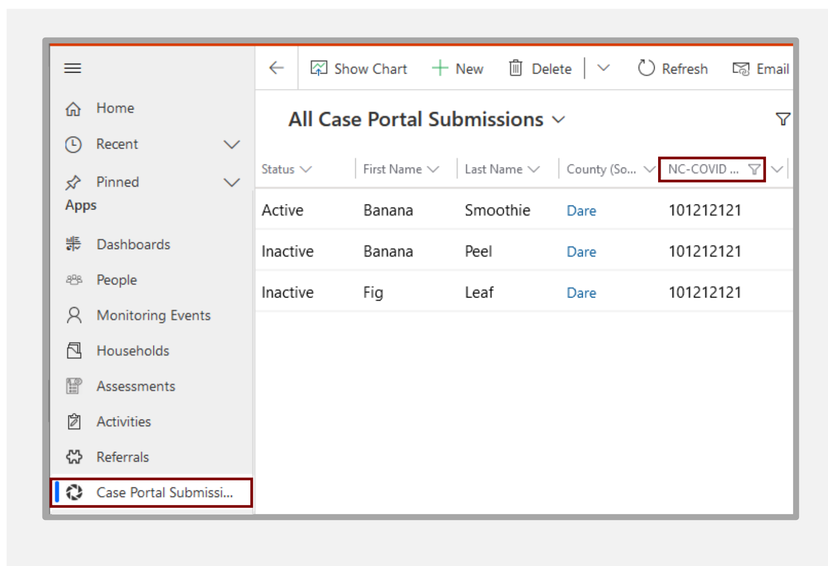
All information regarding any contacts submitted by the case patient is taken by the portal and stored within CCTO; **however, not all of these submissions automatically become new contact monitoring events (MEs).** Specifically:

- All contacts submitted by the case whose last date of exposure is **1) today or a past date** AND **2) after the case's calculated contagious date *(2 days before either their provided symptom onset date OR their test date)*** are **automatically created** as contact MEs within CCTO.
- All contacts submitted by the case whose last date of exposure is **1) a future date** OR **2) before the case's calculated contagious date *(2 days before either their provided symptom onset date OR their test date)*** are not **automatically created** as contact monitoring events in CCTO. If needed, you are able to review this submission and convert it into a new contact ME manually.

If you have been instructed to review submission information, you can follow the process below.

Visit the **Case Portal Submissions Tab.** The available views filter on whether each submission has become a contact event. Note that any contact events that have been accepted as contact events (either manually or automatically) are automatically deactivated by the system.

To view all the contact submissions (accepted and non-accepted) for a particular case, you can filter the ***All Case Portal Submissions*** view by the **NC COVID Event ID of Case** column.



REVIEWING CASE PATIENT PORTAL SUBMISSION INFORMATION:

If you are a CCTO administrator or data manager or if you have been instructed by your local protocol to evaluate case patient portal submissions that have not been automatically accepted as contact events, **please see the next page.**

You should only complete the manual approval process for these submissions if specifically instructed to do so.

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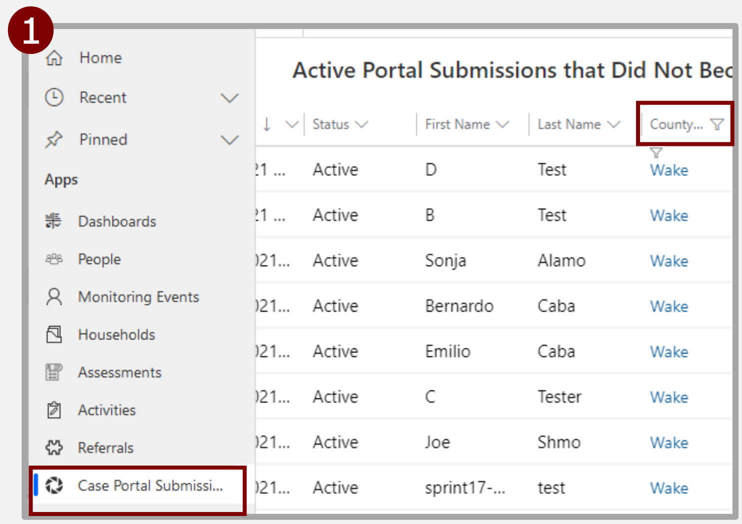
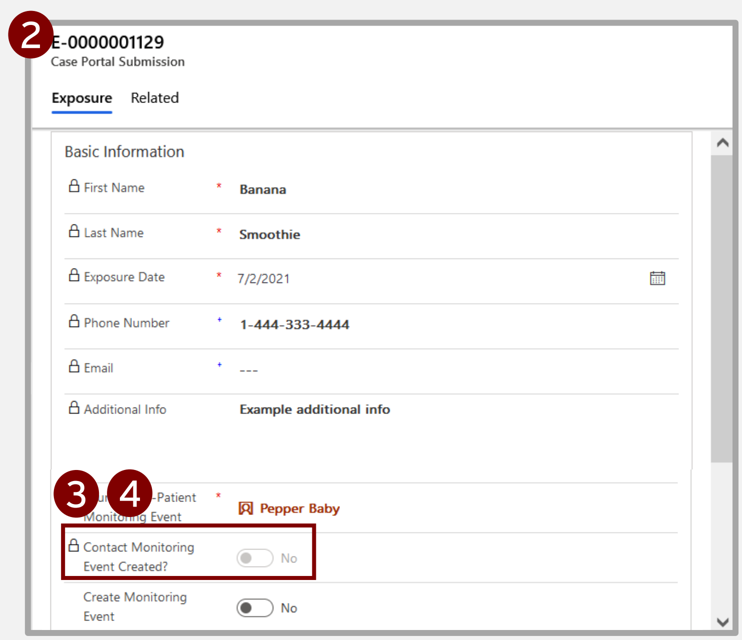
FOR ADVANCED CCTO USERS: Evaluating Case Patient Portal Contact Submissions

ONLY COMPLETE THIS PROCESS IF SPECIFICALLY INSTRUCTED TO DO SO.

1. To see all active submissions that were not automatically turned to contact events, visit the **Case Portal Submissions Tab** and click on the ***Active Portal Submissions That Did Not Become Contact Event Records*** view, which serves as a to-do list of non-accepted submissions that must be reviewed. This view can be filtered by the county of the case patient in order to see only your county's submissions.
2. Clicking into a submission record within the **Case Portal Submissions Tab** will display all info and notes submitted by the case for a close contact.
3. Within a submission record, the locked **Contact Monitoring Event Created?** field shows whether this submission has been converted into a contact event. If it reads "Yes," then this submission is already a contact event within the Monitoring Events Tab, and the field is locked.
4. If it reads "No," then the system has not created a contact event from this submission. **A CI should verify with the case whether this person is a true contact.** If a submission is reviewed and determined not to be a true contact, it should be deactivated, which will remove it from the ***Active Portal Submissions That Did Not Become Contact Event Records*** view.





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FOR ADVANCED CCTO USERS: Evaluating Case Patient Portal Contact Submissions

5. If a non-accepted submission is reviewed and determined to be a true contact who requires a contact event, you can manually toggle the **Create Monitoring Event** field to "Yes" and save. This creates a new contact monitoring event that will be owned by the owner team for the county of the case patient. *All of the fields on the contact submission record are locked, so any necessary changes to this contact's information must be made on the new event.*
6. Once this contact event is created, the system will automatically deactivate this submission record and lock the **Create Monitoring Event** field so that only one contact event may be created per each submission.